INSTRUCTIONS FOR COMPLETING ACTIVITY FORMS

Note: **If more than one project is being proposed, then submit a separate Activity Form for each project.   Only one program may be applied for.**

A.   ACTIVITY DESCRIPTION:

Describe if the activity will be a program or a project. If it is a program then describe if it is a jurisdiction wide program or target area. Depending on local indicators and census data, jurisdictions may be able to strengthen their application by proposing the activity in a target area that has high poverty indicators. If you check target area, you will be held to performing in that area. If you check target area, please read the following two paragraphs:

Scoring for need. If you are proposing housing rehabilitation in a target area, you may use exterior housing condition survey data to show the percentage of units in need of rehabilitation or dilapidated in place of the community-wide data stated in the jurisdiction's housing element. **The survey must be completed using the survey form contained in Chapter 16 of the CDBG Grant Management Manual. The survey data must be more recent than the data in the housing element and if the survey is jurisdiction-wide, then the data must be amended into the housing element.** Note: proposed multi-family housing projects must show the rehabilitation need or units in the project.

Census data. Applicants must also use Census data showing the age of housing stock and overcrowding for the jurisdiction or target area(s). **For target areas, a map must be provided showing the exact census tract and or block groups being served. Each target area will require a separate set of census tables with the proper data.** Note: proposed multi-family housing projects must use jurisdiction-wide data.

1. Check <u>only one</u> of the items listed to indicate how funds will be used.

2. Provide a brief narrative description of the proposed project or program. Your narrative should include either jurisdiction-wide or target area program or multi-family project-specific information on the number of units to be rehabilitated, how many units are owner or renter occupied, and how many families are on your interest list. Priority for rehabilitation should be based on urgent need of health and safety repairs.

3 **Environmental Clearance**: Rehabilitation programs for single family units (HUD defines single family as 1 to 4 units) occupied by owners or tenants are covered under a Rehabilitation Environmental Review (RER). One RER is required for each rehab program funded by a state grant. The RER also works for reconstruction projects.

For rehabilitation of multi-family projects of 4 units or more, a statutory worksheet must be completed and all appropriate "oversight" agencies consulted and documentation of the proper NEPA process **must** be provided. If all items on the statutory work sheet are in primary compliance, the project will convert to exempt. If it does not convert to exempt, the proper publications must be made. If the scope of the project extends outside of the existing footprint and expands the capacity of the project by more than 20%, an environmental assessment must be completed.

B.   NEED FOR ACTIVITY:

1. Choose either Target Area or Jurisdiction-wide housing conditions and complete the chart.

For applicants with a jurisdiction-wide housing rehabilitation program, or a target area program where current survey data are not available, complete this section and attach 2 copies of your Housing Element page showing this information.

For grantees proposing a target area rehabilitation program and are using the survey form contained in the CDBG Grant Management Manual, complete this section. Surveys will only be accepted for target areas, jurisdiction-wide data must be amended into the current housing element.

Sound Units. List the percentage of sound units. The percent entered must be from the latest adopted Housing Element submitted to the HCD's Housing Policy Development Division. If the applicant does not have a Housing Element, contact a CDBG field representative for guidance.

Units suitable for rehabilitation. The percentages entered must be from the latest adopted Housing Element submitted to the HCD's Housing Policy Development Division. **If data are available, break the percentage amounts down by the categories "minor," "moderate," "major" rehabilitation**. If the applicant does not have a Housing Element, contact a CDBG field representative for guidance.

Dilapidated units. The percent entered must be from the latest adopted Housing Element submitted to the HCD's Housing Policy Development Division. If the applicant does not have a Housing Element, contact a CDBG field representative for guidance.

Note: The total percentage of the target area or jurisdiction wide chart, the city or county has chosen to do housing rehabilitation in, should add up to 100%.

2. Age of Housing Stock & Overcrowding.

Age of housing stock. You must use 2000 Census data for this number. Age of housing stock data is available in the 2000 Census Summary File 3, Table DP-4 (see sample in Appendices). If you are unable to find this Table, please ask your CDBG Representative for a copy.

Overcrowding. Overcrowding means 1.01 or more persons per room. You must use 2000 Census data for this number. Overcrowding data are available in the 2000 Census Summary File 3, Table DP-4 (see sample in Appendies). If you are unable to obtain this Table, please ask your CDBG Representative for a copy.

3 Supplemental information. If the Census data for Age of Housing Stock and Overcrowding do not accurately depict your community's need in those categories, please attach third-party documentation, if available, showing your community's worsened needs in either of these two categories and tell us the page numbers. Such supplemental information shall not be older than five years from this year's application filing date and must be specific to the community.

Note: Unless it occurs within the last year, data for condition of housing stock **cannot** be supplemented since the source data are either a housing element or recent survey as noted above.

C.   TARGETED INCOME GROUP BENEFIT

Housing rehabilitation programs are direct assistance activities. Because they are direct assistance activities then all units being provided with CDBG financing must be income qualified and documented as TIG.   Rehabilitation programs will always be 100% TIG.

If a multi family project is proposed then the CDBG funds can only be used to rehabilitate the units of low income/ TIG households. Common improvements like roofs and exterior painting can be pro-rated based on percent of low income units being served. Multi Family Projects that do not clearly show 100 percent TIG benefit, or do not show clearly how only TIG units will be assisted, will not receive points in this category.

1. Check the appropriate box under a. or b.

    a. 1. If your application is for a single family rehabilitation program for owner occupants that are income restricted and 100% TIG benefit as determined by the CDBG Eligibility and Income Limits check the yes box and skip to Readiness Chart.

        2. If your application is for a single family rehabilitation program for owner investors who will rent to tenants that are income restricted and 100% TIG benefit as determined by the CDBG Eligibility and Income Limits, check the yes box and skip to Readiness Chart.

    b. If your application is for a mixed income multifamily project check the yes box and answer question #2 and complete the chart.

2. If a mixed income multi-family project will limited to tenants who are TIG, check the income restricted box. If you have completed a survey check the income survey box.

- Enter the date the survey was completed, the total number of tenants in the project, number of units in the project and number of tenants who responded to the survey.
- Enter the number of tenants who are TIG and Non-TIG.
- Attach a copy of the survey form and results of the survey.

Income restriction: Applicants should demonstrate there is an explicit limitation, based on income, for who is eligible to benefit from the project. (Note: Charging a fee to non-TIG project beneficiaries does not exclude them from being considered CDBG beneficiaries.)

Income survey: Applicants should conduct a survey of existing and/or potential beneficiaries. Please refer to Appendices for guidance on survey methodology.

D. PROGRAM READINESS

Of the 150 points available for capacity, your application may be awarded up to 50 of these points for documentation of actions taken that make the proposed project or program more ready to proceed. These actions must be directly related to the activity. They may include the completion of the special condition and environmental review requirements, securing site control, securing financing for the entire project, or anything that would enable the applicant to be ready to proceed.

Grant Administrator and/or Program Operator--Check the appropriate box, submit the documentation required, resumes and duty statements for staff or applicant and governing body action hiring consultant or approving subrecipient. Write in the page number where the documentation can be found.

Environmental Clearance--Check the appropriate box, submit the documentation required
and write in the page number in the application where the documentation can be found.

Special Conditions--Check the appropriate box, submit the documentation required and write in the page number in the application where the documentation can be found.

Project Readiness-- Check the appropriate box, submit the documentation required, and write in the page number in the application where the documentation can be found. A list of acceptable readiness items are listed Readiness Chart.

A.   ACTIVITY DESCRIPTION:

1. How will be requested CDBG funds be used?

Check <u>only one</u> of the following:

_____ Target Area Rehabilitation Program

Or

_____ Jurisdiction Wide Housing Rehabilitation Program

Or

_____ Multi Family Rehabilitation Project

*Note: When using target areas for rehabilitation activities, rehabilitation work must be completed in all designated target areas.

2. Description of Activity *(see instructions)*:

3. Environmental Clearance: (Please indicate the anticipated level of environmental clearance.)

B. NEED FOR ACTIVITY:

1. Complete the required information on the chart that is applicable to your program.

For **TARGET AREA** programs *with* current survey data.		
Enter the percent of housing units <u>within the target area</u> that are:	**Category**	**List %**
Sound and not in need of Rehabilitation	**Sound**	%
Suitable for **Minor** Rehabilitation	**Minor**	%
Suitable for **Moderate** Rehabilitation	**Moderate**	%
Suitable for **Major** Rehabilitation	**Major**	%
Dilapidated. Not suitable for Rehabilitation.	**Dilapidated**	%
	TOTAL:	**100%**

Be sure to attach a copy of the survey form used and a summary of the survey to this application.

OR

For **JURISDICTION-WIDE** programs.		
Enter the percent of housing units <u>within the jurisdiction</u> that are:	**Category**	**List %**
Sound and not in need of Rehabilitation	**Sound**	%
Suitable for **Minor** Rehabilitation	**Minor**	%
Suitable for **Moderate** Rehabilitation	**Moderate**	%
Suitable for **Major** Rehabilitation	**Major**	%
Dilapidated. Not suitable for Rehabilitation.	**Dilapidated**	%
	TOTAL:	**100%**

Be sure to attach 2 copies of the page from your Housing Element where these percentages are documented.

2. **Age of Housing Stock & Overcrowding.** Provide the requested information for each category.

Enter the percentage of housing stock over 30 years of age (pre-1970) as shown in the 2000 Census Summary File 3, Table DP-4	**Age of Housing Stock**	**%**
Enter the percentage of households who are overcrowded as shown in the 2000 Census Summary File 3, Table DP-4	**Overcrowding**	**%**

> *Be sure to attach the Housing Stock and Overcrowding Census tables to this application. Also, show your calculations on each table.*

3. **Supplemental Information**. This section is used to provide information being rebutted and/or not captured in the 2000 Census in regards to your community's worsened age/condition of housing and/or worsened overcrowding needs. Provide all information that is requested.

Check if you are providing supplemental information for:

_____ Worsened Age/Condition of Housing   _____ Worsened Housing Overcrowding

Describe the worsened Housing Element conditions and/or worsened overcrowding issue that is not reflected in the 2000 Census data:

How is this issue specific to your community?:

List:
- third-party documentation (must be less than 5 years old) that is being submitted to support the issue, and
- the date of the documentation submitted, and
- the page numbers, in this application, where it can be found.

Description of Documentation:	Date of Doc.	Page #
1.		
2.		
3.		
4.		

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C.   TARGETED INCOME GROUP (TIG) BENEFIT

1. Check the appropriate box under a. or b. below.

   a. Is this a <u>single-family</u> program that will be **income restricted** and benefit **100% TIG**?

   _____ Yes. Skip to Readiness Chart   **_____** No. Complete question #2.

   Note: All single-family rehabilitation programs must be income restricted and
   benefit 100% TIG.

   OR

   b. Is this program a <u>mixed income</u> **multi-family** project?

   _____ Yes. Complete question #2.

2. How will **TIG benefit** be established for the mixed income **multi-family** project?

   _____ Income Restriction   **_____** Income Survey. Complete chart below.

   a. If TIG benefit is determined by an income survey, complete the
   following survey information:

Survey Date:	
Total # of anticipated beneficiaries:	
Households or persons?	
How many were surveyed?	
Total number of responses:	
Number of TIG responses:	
Number of Non-TIG responses:	

   b. Based on the survey results, the percentage of **TIG households** that will
   benefit from this proposed activity is:

_____%

   c. ***Attach a copy of the survey form and a summary of the results.***

D.   READINESS TO PROCEED

See Instructions for details of how to complete and provide proper documentation. No partial points will be given, if all readiness documents are not submitted and completed properly then no points will be awarded in the category.

PROGRAM OPERATOR	INDICATE "Yes" OR "No"	DOCUMENTATION Submitted	PAGE NO.
In-House Administration			
Subrecipient Agreement			
Consultant Hired			

ENVIRONMENTAL	INDICATE "Yes" OR "No"	DOCUMENTATION Submitted	PAGE NO.
Complete Environmental Review Record (EER)			
Ready to Publish Public Notice			
Environmental Finding Form			
Form 58.6			

SPECIAL CONDITIONS	INDICATE "Yes" OR "No"	DOCUMENTATION Submitted	PAGE NO.
Program Guidelines			
Temporary Relocation Plan			
PI Reuse Plan Approved			

READINESS	INDICATE "Yes" OR "No"	DOCUMENTATION Submitted	PAGE NO.
Waiting List – Eligible Participants			
List of Eligible Bidders			
Continuation of Existing Program			
Multi Family Project is in Construction			

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